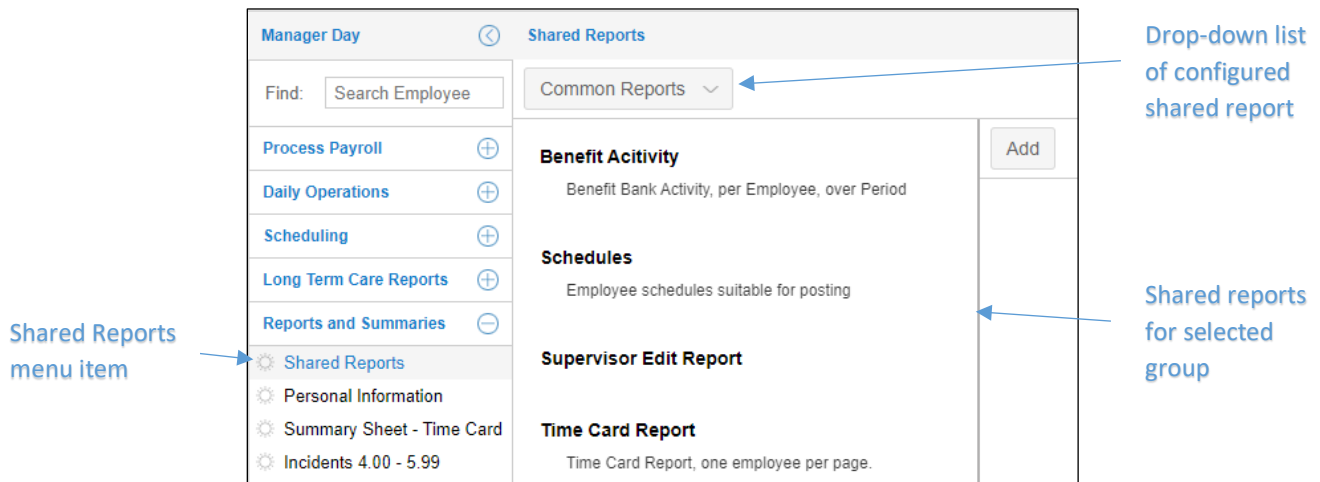


MSS3: Shared Reports

Reporting features in Manager Self Service 3 (MSS3) help supervisors track and analyze payroll and labor information such as employee schedules, benefits, Time Cards and contact information. Shared reports are a group of preconfigured reports based on attendance, scheduling, coverage, attendance history, employee status and system settings.

To access a shared report:

1. Click the Shared Reports menu item in your reporting menu group.
2. Click the report group drop-down list to view all of the reports in the group. Report groups are a collection of reports based on a related time and attendance topic, such as scheduling and benefits.

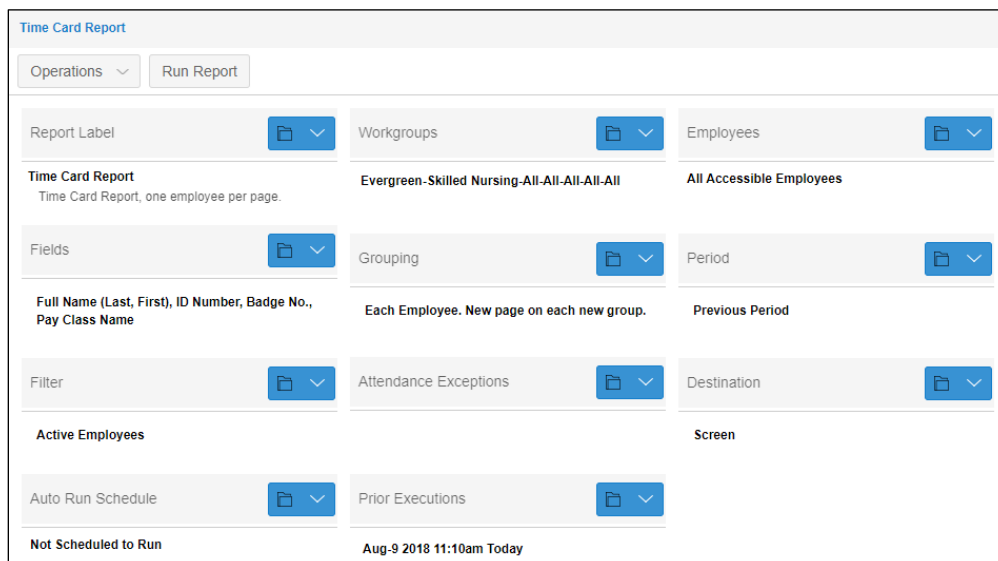


3. Click a report title to view its properties, run the report or make a copy.

Report Properties

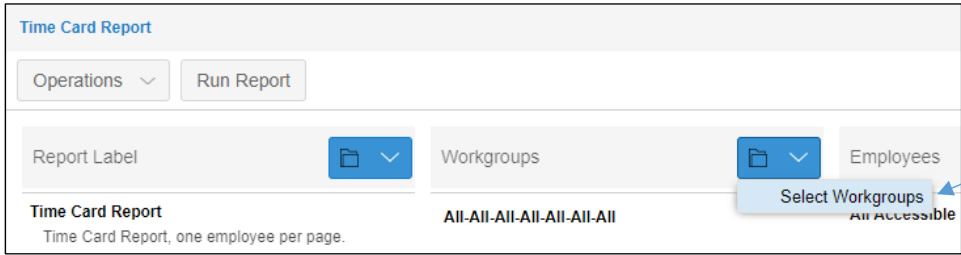
Each report has its own set of properties that determine the content and structure of the report. Properties can be adjusted using their folder menus in the report page.

It is recommended that you make a copy of the report you intend to modify rather than making changes to an existing report. Modifications will affect all users who have access to the report.

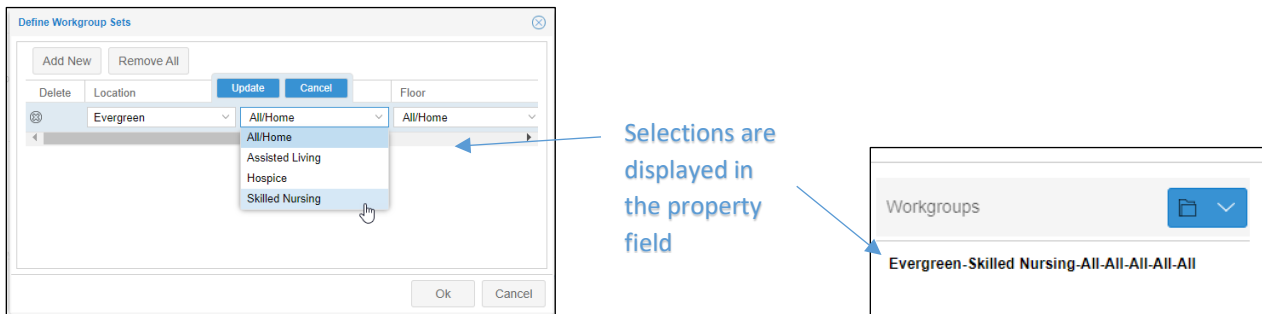


To change a report:

1. Click the property blue folder icon and select a feature in the drop-down list.



2. In the property window, select the changes you would like to make. Your selections will appear beneath the property in the report page.

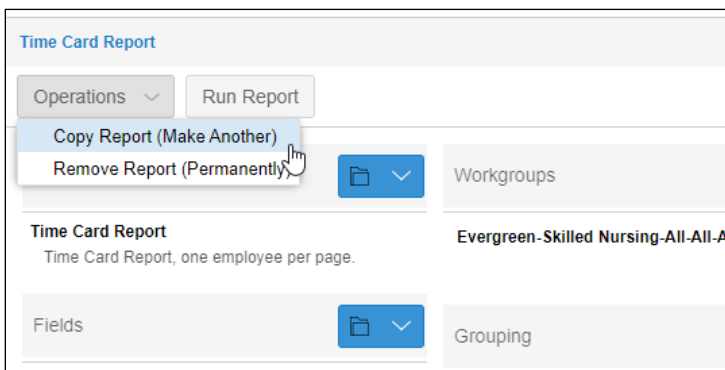


Copying Reports

Reports can be copied, modified and saved to any existing report category or to a new category.

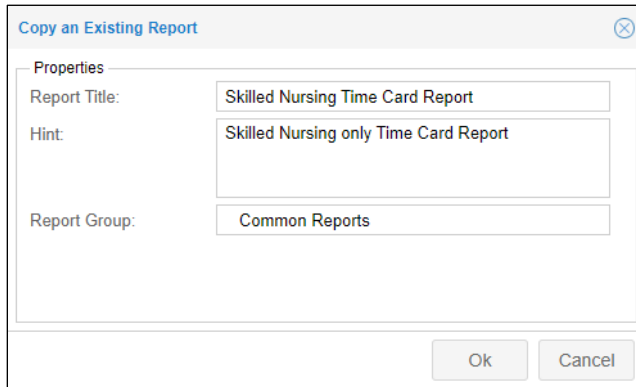
To copy a report:

1. Click the *Operations* drop-down list in the report page of the report you are copying.
2. Select **Copy Report (Make Another)**.



3. Add a title and description to the report in the *Copy an Existing Report* window. Type the name of the report group you want to add the report to or create a new report group with a name not currently in use.

When adding the report group name of an existing report group, type the name exactly as it appears in the list (including matching upper and lower case letters). If the name does not match, a new group will be created.



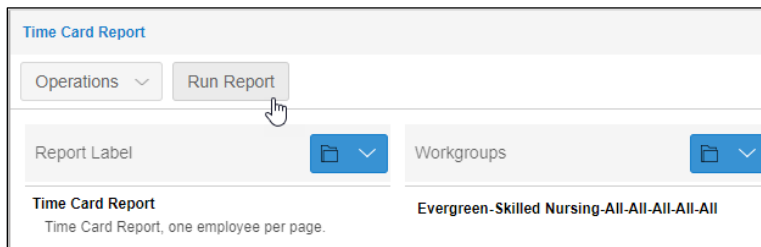
4. Click **Ok** to save your new report.

Running Reports

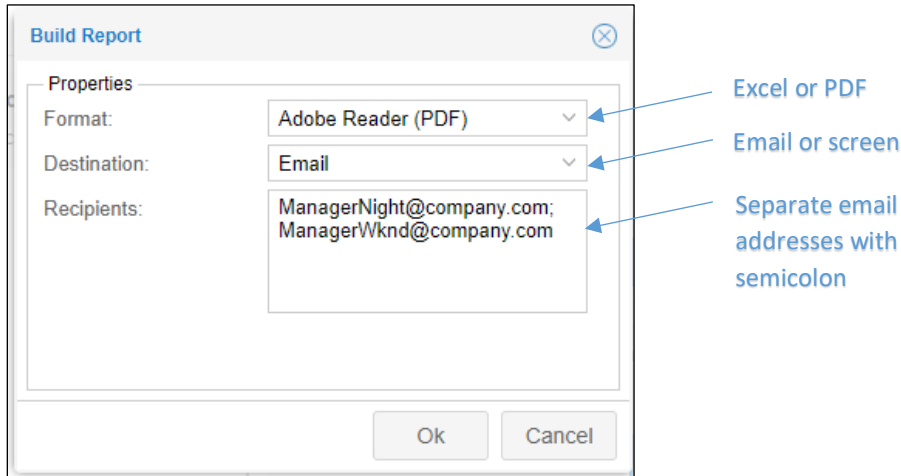
Reports can be run by clicking the **Run Report** button or they can be scheduled to run automatically in the report properties by scheduling when the report will run and the users who will receive the report.

To run a report manually:

1. Click the **Run Report** button in the report page.



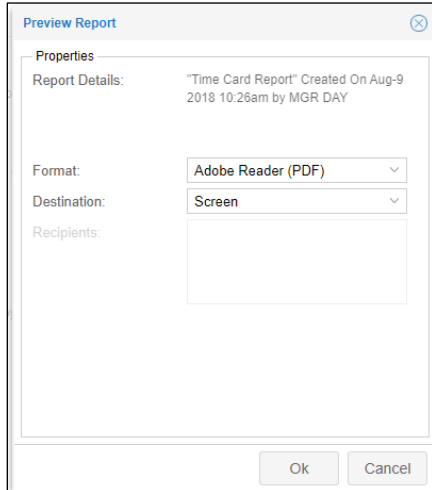
2. Select the report format (Microsoft Excel or PDF) and the destination for displaying the report (screen or mail).



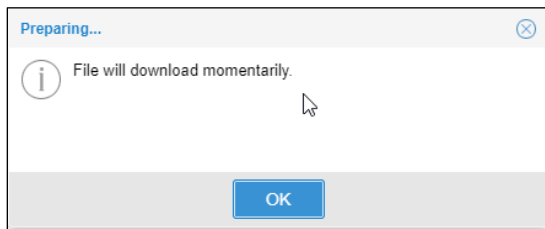
3. If emailing the report, enter the email address in the *Recipients* field.

When entering more than one email address in the Recipients field, separate the addresses with a semi colon.

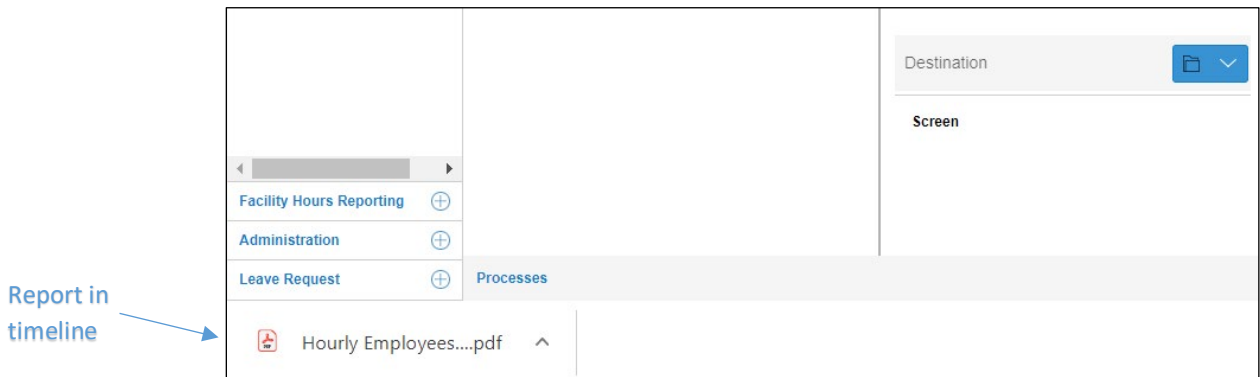
4. Click **Ok** to run the report.
5. Click **Ok** in the *Preview Report* window.



6. Click **Ok** in the window indicating that your file will download momentarily.

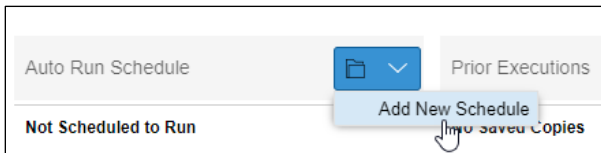


If you selected Screen as the destination, the report file (PDF or Excel) will be downloaded. If you selected Email, the report will be sent to your email and added email addresses with a report preview PDF downloaded to your timeline.

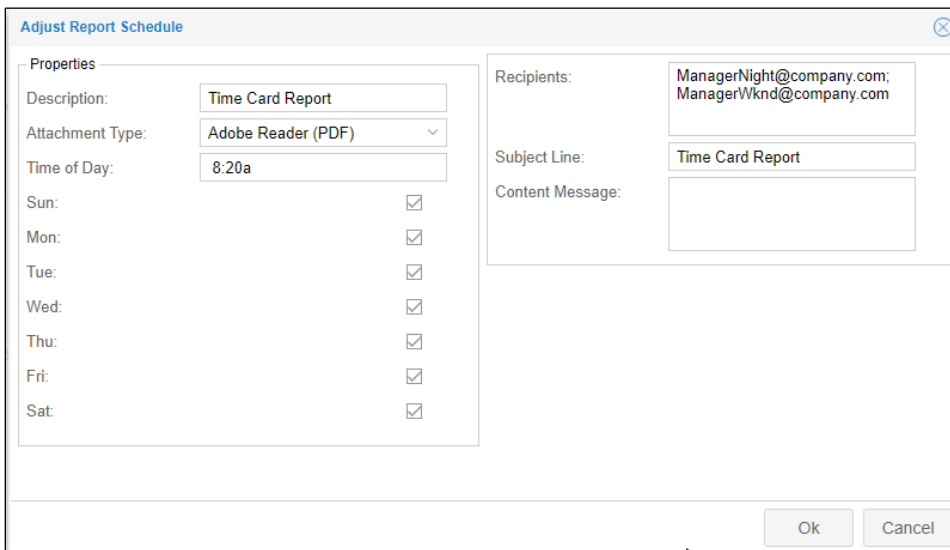


To schedule the report to run automatically:

1. Click the blue folder icon for the Auto Run Schedule report property.



2. In the *Adjust Report Schedule* window, set the day and time the report will run.



3. Select the format of the report.

Properties

Description: Time Card Report

Attachment Type: Adobe Reader (PDF) ▾

Time of Day: Adobe Reader (PDF)

Sun: Employee List CSV (Unformatted)

Mon: Employee List XMLSS for Excel

Tue: Full Detail CSV (Unformatted)

Wed: Full Detail XMLSS for Excel

4. Type the email address of the recipients, separating multiple addresses with a semi colon.
5. Define the appearance of the report with the description, subject line (of email) and add a message if needed.

Adding Reports

1. To add a shared report, click the **Add** button in the *Shared Reports* page.

Shared Reports

Common Reports ▾

Benefit Activity
Benefit Bank Activity, per Employee, over Period

Schedules
Employee schedules suitable for posting

Add

2. In the *Add a New Report* window, type a title for the report and a description of the report in the *Hint* field.

Add a New Report

Properties

Report Title: Kitchen Staff Schedules

Hint: Report Created on Aug-9

Report Group: Newly Created Reports

Base: Employee List ▾

Employee List

Pay Class Assignment

Employee Exceptions

Employee Exceptions by Day

Employee Schedules by Day

Workgroup

Employee Work History Grid

Worked Hours Calendar

Employment History Detail

Employee Benefit Activity

Simple Hourly Pay

Designation Summaries

Hours each employee

OK Cancel

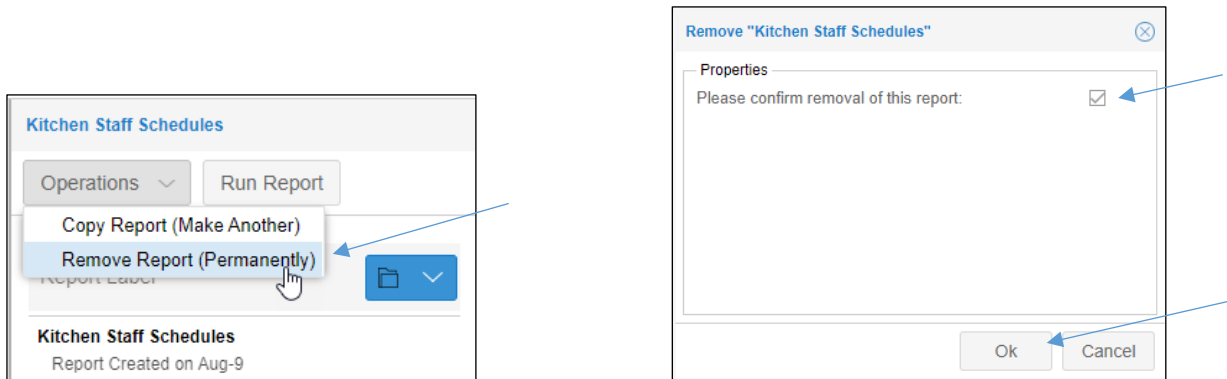
3. Type the name of the report group you want the report to be added to. If this is an existing report group, be sure to match the name exactly to prevent creating a new group.
4. Select the basic structure of the report from the Base drop-down list.

Report structures in the Base drop-down list are predefined in the system.

5. click **Ok** when you have finished updating the fields.

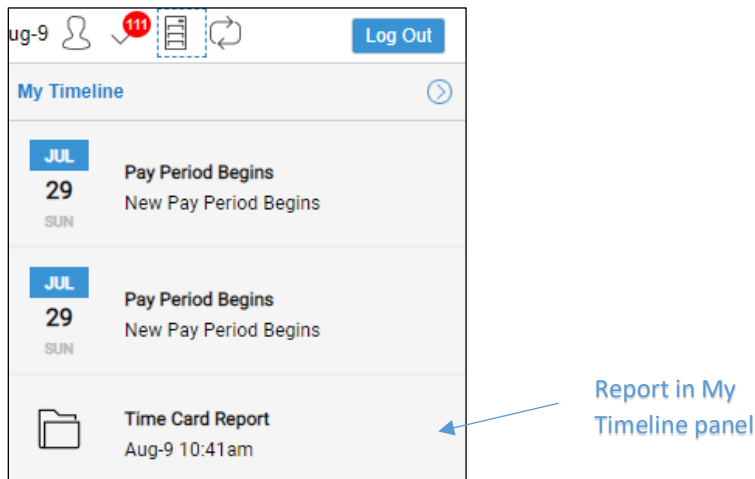
Remove a Report

To remove a report from a report group, click the *Operations* drop-down list in the report page and select **Remove Report (Permanently)**. Enable the **Please confirm removal of this report** check box and click **OK**.

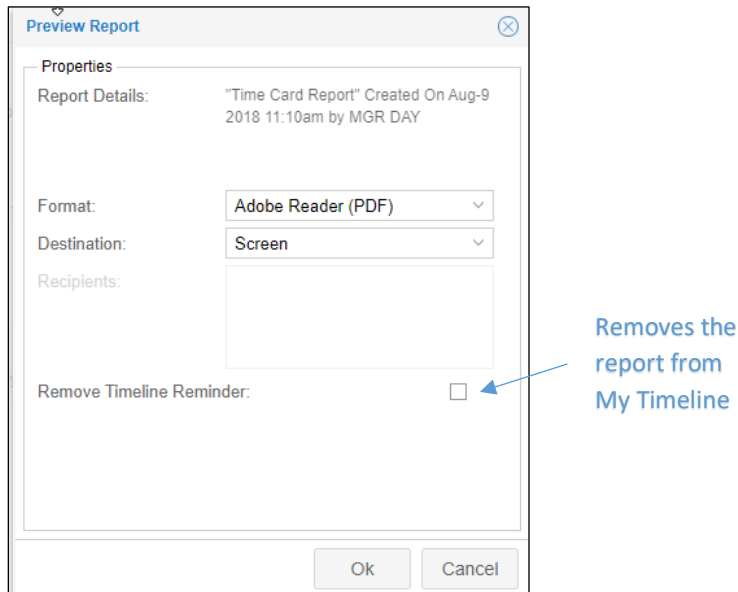


Regenerate a Report

A previously run report can be regenerated from My Timeline quick access button. The My Timeline panel contains a sequential list of user activities and system milestones, including recently generated reports. To run a report from My Timeline, click the report.



Select the format and viewing options, screen or email, in the *Preview Report* window. Do not enable the *Remove Timeline Reminder* check box, which is used to delete the report from My Timeline.



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